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## Changes to Local Schedule GR

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This document outlines revisions to Local Schedule GR. Most of the revisions became effective April 3, 2011. A revised edition was issued July 4, 2012.

Note: The use of an asterisk (\*) in the fourth edition of Local Schedule GR indicates that the record is either new to this edition, the retention period for the record has been changed, or amendments have been made to the description of or remarks concerning the record. An asterisk is not used to indicate minor amendments to grammar or punctuation. Only the changes to those records series with an asterisk have been included in the list below.

### Changes to Local Schedule GR – effective July 4, 2012:

Record Number	Records Series Title	Description of Change
<b>PART 1: ADMINISTRATIVE RECORDS</b>		
GR1000-26a	Correspondence, Internal Memoranda, and Subject Files - Administrative	Retention period changed to 4 years.
GR1000-26b	Correspondence, Internal Memoranda, and Subject Files – General	Retention period changed to 2 years.

### Changes to Local Schedule GR – effective April 3, 2011:

Record Number	Records Series Title	Description of Change
<b>PART 1: ADMINISTRATIVE RECORDS</b>		
GR1000-01a	Agendas – Open Meetings	Series divided into two sub-series. If the minutes of the meeting describe each matter considered by the governing body and reference to an agenda is not required, the retention period is <b>2 years</b> .  If the minutes <u>do not</u> describe each matter considered by the governing body and reference to an agenda <u>is</u> required, the retention period is <b>permanent</b> .

GR1000-01b	Agendas-Closed Sessions	Record description changed to "Certified agendas of closed meetings."
GR1000-06	Petitions	Retention period changed to "Final action on the petition + 2 years." "Final action" defined in remarks as "a decision to take no further action on a petition."
GR1000-08	Speeches, Papers, and Presentations	New records series.
GR1000-20a	Accident Reports – adults	Retention period changed to "3 years from date of report if no claim is filed; 3 years after settlement or denial of the claim if a claim is filed, whichever applicable."
GR1000-20b	Accident Reports – minors	Retention period changed to "Date minor reaches majority age + 3 years, if no claim filed; 3 years after settlement or denial of claim if a claim is filed, whichever applicable."  Citation added: Civil Practice and Remedies Code, Section 16.001.
GR1000-21b	Affidavits of Publication – Election notices	Retention period changed to "Election day + 22 months."
GR1000-22	Annexation, Disannexation, Abolition, and Other Jurisdictional Records	Retention period changed to permanent.
GR1000-26	Correspondence, Internal Memoranda, and Subject Files	Records series title changed [formerly "Correspondence and Internal Memoranda"].
GR1000-26a	Correspondence, Internal Memoranda, and Subject Files - Administrative	Records series title changed [formerly "policy and program development"].  Retention period changed to 3 years.
GR1000-26b	Correspondence, Internal Memoranda, and Subject Files - General	Records series title changed [formerly "administrative"].  Retention period changed to 1 year.
GR1000-30	Legal Opinions	Record description changed to "Formal legal opinions rendered by counsel or the Attorney General for a local government, including any written requests for opinions, concerning the governance and administration of a local government."  Remark added: "For retention of opinions rendered for a Public Information Act Request see GR1000-34. For retention of informal legal opinions and other correspondence

provided by counsel see GR1000-26a.”

GR1000-31	Litigation Case Files	Retention period changed to “AV after decision of a local government not to file a lawsuit or decision that a lawsuit will not be filed against it; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.”
GR1000-33	Public Relations Records	Records series title changed [formerly “News Releases”].  Record description added: “News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.”  Retention period changed to 2 years.  Retention note added: “Review before disposal, some records may merit PERMANENT retention for historical reasons.”
GR1000-34	Public Information Act Requests	Record description revised: “Includes all correspondence and documentation relating to requests for records under the Public Information Act (Chapter 552, Government Code).”
GR1000-34a	Public Information Act Requests – non-exempted records.	Record series title changed [formerly “Open Records Requests”].  Retention period changed to “Date request for records fulfilled + 1 year.”  Citation added: Government Code, Chapter 552.
GR1000-34b	Public Information Act Requests – exempted records.	Retention period changed to “Date of notification that records requested are exempt from disclosure + 2 years.”  Citation added: Government Code, Chapter 552.
GR1000-37	Photographs, Images, Recordings, and Other Non-Textual Media	Record series title changed [formerly “Photographs, Recordings, and Other Non-Textual Media”].  Retention period changed to AV.  Retention note changed to: “Review before disposal, some records may merit <b>PERMANENT</b> retention for historical reasons. Some photographs and other non-textual media of the types described should be retained <b>PERMANENTLY</b> for historical reasons, but latitude is allowed to the records management officer and the custodians of records in a local government to determine to what extent a particular photograph, for example, documents the history and activities of the local government. Local governments should

consult with local historical or genealogical societies to assist with the appraisal. If it is determined that it does not, it need be kept only as long as administratively valuable. **Be certain that photographs and other non-textual media do not fall within other records series. For example, mug shots and photographs of fire damage are listed in Local Schedule PS (Records of Public Safety Agencies) under police and fire department records respectively.**

GR1000-38	Policy and Procedure Documentation	Retention period changed to "US, expired, or discontinued + 5 years."
GR1000-40a	Records Management Records – Records control schedules	Retention period changed to US.  Retention note added: "Original is retained by the State and Local Records Management Division, Texas State Library and Archives Commission."
GR1000-40c	Records Management Records – Lists or inventories of records	Retention period changed to "US, expired, or discontinued."
GR1000-40d	Records Management Records – plans and similar documents	Record description changed to "Plans and similar documents establishing the policies and procedures under which a records management program operates, including records protection and disaster and preparedness recovery plans."
GR 1000-41a	Reports and Studies (Non-Fiscal) – Annual, subannual, and irregularly prepared reports	New records series added for working papers used to create non-fiscal reports and studies (GR1000-41a(5) and (6)).
GR1000-42	Waivers of Liability	Retention note added: "If an accident occurs to any person covered by a signed waiver of liability, it must be retained for the same period as accident reports. See item number GR1000-20 in this schedule."
GR1000-43	Conflicts Disclosure Statements and Conflict of Interest Questionnaires	New records series.
GR1000-44	Lists of Local Government Officers	New records series.
GR1000-45	Calendars, Appointment and Itinerary Records	New records series.
GR1000-46	Insurance Claims	New records series.
GR1000-47	Customer Surveys	New records series.

GR1000-50            Transitory Information.            New records series.

**PART 2: FINANCIAL RECORDS**

*The language of Retention Note (b), pertaining to Grant Records, in introduction to Part 2 of this schedule, was substantially revised.*

GR1025-03b	Bond Records – Bond certificates and redeemed coupons	Citation changed to “Government Code, Section 1302.003 for counties (see statute for procedural instructions for destruction) and by authority of this schedule for all other local governments.”
GR1025-05a	Capital Assets Records - Equipment or property history cards or similar records containing data on initial cost...	Retention period changed to “FE of date of disposal + 5 years” for school districts.  Retention note added: “ <b>Retention Note:</b> Review before disposal; property history cards documenting the original construction and additions to or renovations of structures may merit <b>PERMANENT</b> retention for historical reasons.”
GR1025-05b	Capital Assets Records – Equipment or property cost and depreciation schedules...	Retention period changed to “FE of date of disposal + 5 years for school districts; FE + 3 years for other governments.”
GR 1025-06	Federal Revenue Sharing Records	Retention period changed to 5 years. Citation changed to 31 CFR 103.38(d).
GR 1025-08a	Grant Development and Administrative Records – Successful grant applications and proposals...	Retention period changed to “FE + 5 years for school districts; FE + 3 years for other governments.”
GR1025-08b	Grant Development and Administrative Records – Financial, performance, and compliance reports...	Retention period changed to “FE + 5 years for school districts; FE + 3 years for other governments.”
GR1025-09a	Investment Transaction Records – documentation related to the investment of public funds...	Retention period changed to “FE + 5 years.”
GR1025-09b	Investment Transaction Records – documentation related to the calculation of arbitrage rebate amounts...	New records series.
GR1025-10	Charge Schedules / Price Lists	New records series.

GR1025-25	Accounting Policies and Procedures Documentation	Retention period changed to "US, expired, or discontinued + 5 years."
GR1025-26a	Accounts Payable and Disbursement Records – claims, invoices, statements...	Record number changed [formerly GR1025-26]. Retention period changed to "FE + 5 years for school districts; FE + 3 years for other governments."
GR1025-26b	Accounts Payable and Disbursement Records – accounts payable records sufficient to document...	Record number changed [formerly GR1025-26(a)]. Retention period changed to "FE + 5 years for school districts; FE + 3 years for other governments."
GR1025-26c	Accounts Payable and Disbursement Records – fund transmittal reports...	Record number changed [formerly GR1025-26(b)].
GR1025-27a	Accounts Receivable Records – bill copies or stubs, statements, deposit...	Record number changed [formerly GR1025-27].
GR1025-27b	Accounts Receivable Records – monies remittable to Comptroller	Record number changed [formerly GR1025-27(a)]. Retention period changed to "Remittance due date + 5 years."
GR1025-27c	Accounts Receivable Records – government holds a property lien	Record number changed [formerly GR1025-27(b)].
GR1025-27d	Accounts Receivable Records – receipt of cash deposits as sureties for delivery of services	Record number changed [formerly GR1025-27(c)].
GR1025-27e	Accounts Receivable Records – uncollectable accounts	Record number changed [formerly GR1025-27(d)].
GR1025-28	Banking Records	Retention period changed to FE+5 for all local governments.
GR1025-29	Cost Allocation and Distribution Records	Retention period changed to "FE+5 for school districts; FE+3 for other local governments."
GR1025-30a(1)	Ledgers, Journals, and Entry Documentation – General ledger – Annual audit report exists	Retention period changed to FE+5 for all local governments.
GR1025-30b	Ledgers, Journals, and Entry Documentation – Subsidiary	Retention period changed to FE+5 for all local governments.

ledgers

GR1025-30c	Ledgers, Journals, and Entry Documentation – Receipt, disbursement, general, or subsidiary journals.	Retention period changed to FE+5 for all local governments.
GR1025-30d	Ledgers, Journals, and Entry Documentation – Journal vouchers and entries...	Retention period changed to FE+5 for all local governments.
GR1025-31d	Transaction Summaries – Annual	Retention period changed to “FE+5 for school districts; FE+3 for other local governments.”

**PART 3: PERSONNEL AND PAYROLL RECORDS**

*Change in Retention Note (f), pertaining to Personnel Records in Sheriff’s Departments in Certain Counties: “population of 2,000,000 or more” was changed to “population of 3.3 million or more.”*

GR1050-06	Counseling Program Records	Records series title changed [formerly “Counseling Program Files”].
GR1050-06a	Counseling Program Records – Reports of interviews, analyses, and similar records	Record description changed to “Reports of interviews, analyses, and similar records relating to the counseling of an employee for work-related, personal, or substance abuse problems, including any warnings associated with the counseling.”
GR1050-07	Disciplinary and Adverse Action Records	Two sub-series added pertaining to law enforcement personnel in certain local governments. <i>No change for all other local government employees.</i>
GR1050-08a	Employee Pension and Benefits Records – employee benefit plans	Retention period changed to “Termination of plan + 4 years.”
GR1050-08b(2)(A)	Employee Pension and Benefits Records – Enrollment forms – Official record maintained by the local government (not the retirement system) – Pension and deferred compensation	Retention period changed to “Date of separation + 75 years.”
GR1050-08b(2)(B)	Employee Pension and Benefits Records – Enrollment forms – Official record maintained by the local government (not the	Record description changed to include accidental death insurance.

	retirement system) – Life, health, accidental death, and disability insurance	
GR1050-11	Employee Selection Records	“Criminal history checks” removed from series description (now its own series: GR1050-56).
GR1050-12	Employee Service Records	Retention period changed to “Date of separation + 75 years.”  Retention Notes (a) and (b) changed to reflect new retention period.
GR1050-21	Job Evaluations (Performance Appraisals)	Sub-series (b), pertaining to public school teacher evaluations, removed (teacher evaluations are now included on Local Schedule SD, records series SD3575-05).  Retention period changed to “US + 2 years; or date of separation + 2 years, whichever is applicable.”
GR1050-22b(1)	Medical and Exposure Reports – for employees exposed to toxic substances, etc.	Citation changed to 29 CFR 1910.1020(d) (1) (i) (ii) (iii).
GR1050-22c	Medical and Exposure Reports – monitoring reports	Reference added to Local Schedule PW, records series PW5450-01 (Asbestos Management Records).
GR1050-22d	Medical and Exposure Reports – drug and alcohol testing	New records series.
GR1050-26a	Position Description, Classification, and Staff Monitoring Records – Job descriptions	Record description changed to add: “Also includes documentation concerning the development and analysis of job descriptions and classification systems, including survey, review and audit reports; classification standards and guidelines; selection criteria; determination of classification appeals; etc.”  Citation changed to 40 TAC 815.106(i).
GR1050-28	Training and Educational Achievement Records	Records series title changed [formerly “Training and Educational Attainment Records”].
GR1050-28b	Training and Educational Achievement Records – Training program records	Retention period changed to 2 years.
GR1050-28c	Training and Educational Achievement Records – Training aids such as syllabi	Retention period changed to “US, expired, or discontinued + 2 years.”
GR1050-29	Unemployment	Retention period changed to “After closed + 5 years.”

Compensation Claims Records

GR1050-30	Verifications of Employment Eligibility (INS Form I-9)	Citation changed to 8 CFR 1274a.2 (b) (2) (i) (A) and (c) (2).
GR1050-32	Workers Compensation Claim Records	Retention period changed to "CE of closure of claim + 5 years." Citation changed to 29 CFR 1904.33 Retention Note added. Remark added regarding permanent records held by other entities.
GR1050-34	Public Access Option Forms	New records series.
GR1050-35	Employee Exit Interviews	New records series.
GR1050-36	Criminal History Checks	New records series.
GR1050-37	Employee Acknowledgement Forms	New records series.
GR1050-38	Unsolicited Resumes	New records series.
GR1050-39	Volunteer Service Files	New records series.
GR1050-51	Direct Deposit Applications/Authorizations	Retention period changed to "US or date of separation, as applicable."
GR1050-52a	Earnings and Deduction Records – record containing certain payroll information	Retention period changed to 5 years for school districts [no change for other local governments].  Citation changed to 20 CFR 404.1225(b) (3) and 40 TAC 815.106(i).
GR1050-52b	Earnings and Deduction Records – pension and deferred compensation information	Retention period changed to "Date of separation + 75 years."
GR1050-52c	Earnings and Deduction Records – master payroll register	Retention period changed to FE+5 for school districts [no change for other local governments].
GR1050-52d(1)	Earnings and Deduction Records – subsidiary registers	Retention period changed to FE+5 for school districts [no change for other local governments].
GR1050-52f	Earnings and Deduction Records – payroll adjustment	Retention period changed to FE+5 for school districts [no change for other local governments].

GR1050-54a	Leave Records – record containing certain sick leave information	Retention period changed to “Date of separation + 75 years.”
GR1050-54b	Leave Records – leave requests	Record description changed to include FMLA (Family Medical Leave Act) requests and supporting documentation.  Retention period changed to FE+5 for school districts [no change for other local governments].
GR1050-54c	Leave Records – registers	Retention period changed to FE+5 for school districts [no change for other local governments].
GR1050-55a	Payroll Action or Information Notices – hiring, termination, transfer, etc.	Reference added to records series GR1050-12 for certain information that must be kept in Employee Service Record.
GR1050-55b	Payroll Action or Information Notices – adjustments to payroll and leave status	Reference added to records series GR1050-12 for certain information that must be kept in Employee Service Record.
GR1050-56	Time and Attendance Reports	Citation changed to 40 TAC 815.106(i).
GR1050-58	Requests and Authorizations to Engage in Reimbursable Activities	Retention period changed to FE+5 for school districts [no change for other local governments].
<b>PART 4: SUPPORT SERVICES RECORDS</b>		
GR1075-01a	Bids and Bid Documentation – successful bids	Retention period changed to “FE of award +5 years” for school districts [no change for other local governments].
GR1075-01c	Bids and Bid Documentation – requests for informal bid estimates	Record description changed.
GR1075-01d	Bids and Bid Documentation – requests for information (RFI)	New records series.
GR1075-03a	Purchase Order and Receipt Records – purchase orders, requisitions, and receiving reports	Retention period changed to FE+5 for school districts [no change for other local governments].
GR1075-16	Construction Project Files	Records series divided into two sub-series: 1075-16a for permanent structures such as buildings, 1075-16b for projects such as bus shelters or baseball diamonds.

GR1075-16a	Construction Project Files – permanent structures	Retention Note added regarding to the disposition of records when a structure, facility, or system is sold or transferred to another person or entity.
GR1075-16b	Construction Project Files – smaller projects	Retention Notes added regarding permanent retention for certain types of historical records.
GR1075-18a(2)	Maintenance, Repair, and Inspection Records – vehicle maintenance/repair records	Retention Note changed: “If a vehicle is salvaged as the result of an accident, the maintenance and repair records for the vehicle must be retained for date of salvage + 1 year.”
GR1075-18b(2)	Maintenance, Repair, and Inspection Records – certain facilities maintenance, repair, inspection records	Retention period changed to 5 years. Retention Note added regarding certain records of repairs.
GR1075-20a	Usage Reports – reports that are the basis of allocating costs, etc.	Retention period changed to FE+5 for school districts [no change for other local governments].
GR1075-21	Vehicle or Equipment Assignment Records	Records series title changed [formerly “Vehicle Assignment Records”].  Record description changed to include equipment.  Retention period changed to “After return or reassignment + 2 years.”
GR1075-24	Vehicle Titles and Registrations	New records series.
GR1075-25	Surveillance Videos	New records series.
GR1075-41a	Telephone Logs or Activity Reports – if log is used for cost allocation purposes	Retention period changed to FE+5 for school districts [no change for other local governments].
GR1075-41b	Telephone Logs or Activity Reports – if log is used for internal control purposes other than cost allocation	Retention period changed to 1 year.
GR1075-41c	Telephone Logs or Activity Reports – internal telephone directories	New records series.
GR1075-42	E-Rate Records	New records series.
GR5750-02	Facility Chemical Lists	Retention period changed to 30 years.

Record description reflects re-naming of state agency.

**PART 5: INFORMATION TECHNOLOGY RECORDS**

*Part 5 title changed [formerly "Electronic Data Processing Records"].*

GR5800-02	Finding Aids, Indexes, and Tracking Systems	Citation removed.
GR5800-03	Hardware Documentation	Citation removed.
GR5800-04	Master File Records	Citation removed.
GR5800-05	Processing Records	Records series title changed [formerly "Processing Files"].
GR5800-06	Software Programs	Citation removed.
GR5800-07	Source Documents for Electronic Records	Records series removed. For administrative rules regarding source document destruction, see Section 205.008, Local Government Code.
GR5800-08	Technical Documentation	Citation removed.
GR5825-01	Access Security Records	Retention period changed to "All audit or legal requirements have been met."
GR5825-02	Batch Data Entry Control Records	Retention period changed to "AV after reconciliation confirmed."
GR5825-03	Chargeback Records to Data Processing Services Users	Retention period changed to FE+5 for school districts [no change for other local governments].
GR5825-05	Data Processing Policies and Procedures	Retention period changed to "Until superseded, expired, or discontinued + 5 years."
GR5825-07	Network Systems Disaster Preparedness and Recovery Plans	Records series title changed [formerly "Disaster Preparedness and Recovery Plans"].
GR5825-08	Electronic Media Library System Records	Records series title changed [formerly "Electronic Media Library System Files"].
GR5825-10	Network Circuits Inventories	Records series title changed [formerly "Electronic Circuits Inventory"].
GR5825-11	Network Implementation Records	Records series title changed [formerly "Network Implementation Files"].

GR5825-15	Project Records	Records series title changed [formerly "Project Files"].
GR5825-17	Electronic Records Training Records	Records series title changed [formerly "Training Course Information"].  Records series split into two sub-series that address whether the training is required.
GR5825-17a(1)	Electronic Records Training Records – training required to hold a specific position or required of all employees	Retention period changed to "Date of separation + 5 years."
GR5825-18	Internet Cookies	New records series.
GR5825-19	History Files – Web Sites	New records series.
GR5825-20	Software Registrations, Warranties, and License Agreements	New records series.